



***Idaho Virtual University Consortium
Phase One — Current Status***

General Report

***Prepared for Presidents and Chief Academic Officers
Idaho State Board of Education
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PHASE ONE FINAL REPORT AND PROJECT TIMELINE

D. Kaye Gapen (Northern Lights Inc.) prepared this report. Staff members from participating institutions supplied working materials. Meetings and discussions included:

- ◆ Members Of The Presidents Council
- ◆ Chief Academic Officers From The Participating Institutions
- ◆ Staff Members From Participating Institutions
- ◆ ICTL Higher Education Sub-Committee Members
- ◆ Higher Education Ad Hoc Technical Sub-Committee

At their November meeting, the Szofran and Gapen recommended this approach to the President's and they approved Phase One.

Final Report

The time available to complete the two-month project was compressed as a result of the need for an early January 2000 deadline and holidays in November and December. Gapen prepared a preliminary Phase One Project Report for the Presidents Council meeting on January 4, 2000. We were unable to meet our projected goal for completion of the complete Final Report for two reasons:

- ◆ Completing the compilation of course information for each institution proved to be more challenging than anyone anticipated.

Following the Jan. 4th 2000 Presidents Council meeting, Nancy Szofran, Blake Beck, and Kaye Gapen reviewed the course information provided by staff members at each institution. We agreed that Blake Beck would take the lead in working with institutional staff members to complete the compilation of a list that was as accurate as possible in the two weeks following the Jan. 4th Presidents Council meeting. Among the problems we discussed were:

- ◆ Different levels of details among institutions
- ◆ Different levels of completeness among institutions
- ◆ Different lists for some of the same institutions
- ◆ Staff members at Eastern Idaho Technical College were unable to provide the College's project data and information until after the Jan. 4th Presidents Council meeting.

We balanced the time required to complete the Final Report with our preparation of the Phase Two preliminary project materials for the Provost meeting scheduled for January 20th.

Project Chronology

The project chronology began with a November 1999, session with the Presidents Council members discussing the scope and components of the possible project. The Presidents agreed to proceed. The second sessions occurred in early December and included meetings with the Presidents Council, the Provosts, and the members of the ICTL Higher Education Sub-Committee and Higher Education Ad Hoc Technical Subcommittee. The Presidents and Provosts confirmed the project components (see Appendices).

In a working session with the ICTL Higher Education Subcommittee, the Higher Education Ad Hoc Technical Subcommittee, and campus staff members responsible for distance education, we discussed, refined, and confirmed the data and information they would provide for the project analysis. The working group also recommended including the Idaho State Library and Idaho Public Television (also members of the ICTL Higher Education Subcommittee) in the Report.

Between December 9, 1999 and December 29, 1999, participants prepared materials and provided them to Northern Lights Inc. NLI supported this effort with phone conversations, explanations, and the provision of additional information for some institutions. At NLI, we developed the *Preliminary Final Report* the week of December 27, 1999. Though we had originally intended two weeks for report preparation, the time participants needed decreased the time available for Final Report preparation. As a result, we were not able to include full information for the Idaho State Library and Idaho Public Television in this draft report though we will add the two organizations as we complete any revisions for the Final Report. Participants in the Phase 1 project include:

- ◆ Boise State University
- ◆ College of Southern Idaho
- ◆ Eastern Idaho Technical College
- ◆ Idaho State University
- ◆ Lewis-Clark State College
- ◆ North Idaho College
- ◆ University of Idaho
- ◆ Idaho State Library (included partially)
- ◆ Idaho Public Television (included partially)

IVUC Website Scenario

[<http://members.aol.com/testarea/ivu>]

In addition to the Final Report, Northern Lights Inc. also developed a scenario Idaho Virtual University (IVU) Consortium Website. It was presented to the Presidents at the January 4, 2000, meeting with accompanying documentation.

INTRODUCTION TO THE IDAHO VIRTUAL UNIVERSITY CONSORTIUM PROJECT

The development of distance learning and distance education programs by the colleges and universities comprising the Presidents Council of the Idaho State Board of Education has been underway in Idaho for years. Most recently, the Presidents of seven of the institutions¹ are focusing on creating a more unified approach to presenting and providing access to their institutions' distance learning and distance education opportunities. The current title for this undertaking is the *Idaho Virtual University Consortium (IVUC)*.

At the Presidents Council meeting on October 5th 1999, the Presidents directed Nancy Szofran (Chief Technology Officer) to consider various options for IVU Consortium and its delivery of distance education, including issues of costs as well as other areas where presidential leadership would be important. The Presidents asked Ms. Szofran to report back at the November 1999 Council meeting with an approach to bringing the IVU Consortium online as quickly as possible. Ms. Szofran contacted Northern Lights Inc. whose principals have over fifty years of experience in higher education and the impact of technology on teaching and learning.

¹ 1) Boise State College, 2) the College of Southern Idaho, 3) Eastern Idaho Technical College, 4) Idaho State University, 5) Lewis-Clark State College, 6) North Idaho College, and 7) the University of Idaho.

A PHASED APPROACH AND ITS ASSUMPTIONS

In discussion of the Idaho Virtual University Consortium, Szofran and Gapen considered both the components and the timing issues that would be related to completing the Consortium's implementation (per the Presidents' directions). We concluded that it would be important to implement the IVU Consortium in phases.

Phasing the Consortium enables an early implementation that could take advantage of the capabilities already available at each university and college. This is important because continuing design and implementation must balance three needs (and their related decisions):

- ◆ A short timeline related to a Fall 2000 IVU Consortium presence available via a website
- ◆ A longer timeline for each university and college to continue to realign its planning and alignment of resources as it expands its distance education program—within the context of its “technology and learning” environment
- ◆ A longer timeline for the colleges and universities as a Consortium to continue to develop the Consortium's governance or decision-making structure, content, student services support, technological delivery capabilities, and so forth.

The second and third needs are also well met by phasing if you make some assumptions at the beginning of the phasing activities:

- ◆ The first assumption is that it is possible to create a website for the Idaho Virtual University Consortium very quickly—perhaps for the Fall 2000 term—if you agree with assumptions two and three.
- ◆ The second assumption is that you can begin immediately—if you begin as you mean to go on — by establishing early directions and some of the principles that can provide continuity over each phases' directions and decision-making.
- ◆ The third assumption is that you can grow the Consortium—phase by phase—through transition planning and rapid prototyping.

As we are able to bring together “phasing” and the assumptions that support phasing, we lay the groundwork for framing the design and initial implementation of the Consortium, as well as considering how to grow the consortium and its programs and services. Before we consider what the phases might be, it is helpful to consider related issues of timing and context.

THE TIME IS RIGHT

[Related Final Report Section: *Distance Learning and Universities*]

Capitalizing on Lessons Learned

Based on our research and discussions with clients and colleagues, we view this to be an opportune time for moving ahead with a distance education program. This is an excellent time for the Presidents to consider the distance learning investments they have already made at each institution in order to capitalize on the lessons they have learned individually. This is not only important for the future of each separate campus; it is crucial to the design and implementation of a *Consortium* and its members' consortial use of technology to deliver education.

The last few years have been marked by an increasing intensity and frequency in activities related to distance learning, distributed education, and the development of virtual organizations of all kinds. By all accounts, the "market" is vast, the competition fierce, and the possible financial gains enormous.

Even more important, however, is a growing understanding of the synergies inherent in the combination of *technology and learning*. Researchers and practitioners are continuing to write about the manners in which technology supports multiple learning modalities. It is increasingly possible to design *intelligence* into content and its technologically-based delivery. Early faculty experience in attempting to realize this potential indicates that the economics of course development and delivery is changing in favor of the university or college. See Carol Twigg's work at the Center for Learning and Technology. [<http://www.center.rpi.edu/PewGrant.html>]

Critical Success Factors

Success in taking advantage of new technologies, however, is not assured by simply spending large sums of money or developing Web-based delivery mechanisms for existing course materials.

A recent important industry analysis supports this assertion. The authors of *Online Post-Secondary Education: A Competitive Analysis*² (Christine Massey and Joanne Curry) completed an analysis of eleven higher education institutions and/or consortia engaged in the delivery of distance education (including WGU). The authors developed ten factors vital to the success of online learning ventures. Massey and Curry conclude that success among the eleven has been mixed. They also make it clear, however, that while gaps may presently exist in the ability of the

² *Online Post-Secondary Education: A Competitive Analysis* by Christine Massey and Joanne Curry (TeleLearning Network Inc.), prepared for Industry Canada, March 31, 1999. Available at <http://www.telelearn.ca> – Research Showcase.

“eleven” to create virtual campuses; the current technological marketplace also presents vast opportunities. The ten critical success factors are:

- ◆ Clearly define the mission of the Virtual University. If it is part of an existing university, ensure that the Virtual University fits and supports the institution’s overall mission (for example, does it support faculty renewal? an institution’s commitment to access? Revenue goals?)
- ◆ Provide adequate capital to finance start-up and growth.
- ◆ Define the institution’s competitive advantage (price? quality, identifying a niche program, client service, convenience)
- ◆ Identify the primary client groups and the complete programs that meet their needs.
- ◆ Invest in top quality offerings by employing first-rate faculty, first-rate learning technology and approaches, and by continually monitoring quality.
- ◆ Use a student/learner (client) centered pedagogical model.
- ◆ Develop sound marketing strategies for growth (international markets? offerings of new programs? developing a new client base?)
- ◆ Create a common learning delivery approach through faculty training and institution-wide platforms.
- ◆ Provide comprehensive administrative resources for students and instructors.
- ◆ Implement centralized service standards to ensure responsiveness.

We note that it will be useful for participants to consider these “critical success factors” as they conceptualize the IVU Consortium. In addition, we have used the Massey and Curry analysis framework as one of our framing mechanisms for the Phase One Project, its information gathering, analysis, and recommendation development for the Phase Two Projects.

Success Factors and Leaping Ahead

Taking advantage of today’s opportunities and leveraging investments in *technology and learning* will enable individual and/or consortial universities and colleges to “leapfrog” ahead of their distance education competitors.

Today’s information and communications technologies are radically altering any organization’s ability to design, implement, and deliver education. Equally important to this education equation are peoples’ rapidly evolving expectations, abilities, and behaviors as individuals and organizations view and use the same information and communication technologies.

These factors taken together result in our conclusion that the SBOE Presidents are right on target in considering anew the framing of their electronically delivered distance education. The context and opportunities for the Presidents Council institutions have changed markedly since their membership in the Western Governors University began.

This phase of their development of the Idaho Virtual University Consortium lays the foundation for redesign based on the lessons learned and opportunities inherent in today’s

information and communications technologies as well as leveraged state investments in those technologies.

THE PATH TO TAKE — WHAT TO PHASE

With all of these factors in mind, Szofran and Gapen met with the Presidents and recommended that they consider three phases.

◆ **Phase One — November/December 1999**

The primary purpose of the Phase 1 Project is the development of an overview and analysis of current distance learning and/or distance education activities across the participating institutions.

The secondary purpose is to develop an analysis and decision-making framework for subsequent decision-making and project phases. The structure for the analysis must be sufficiently detailed to handle data and information relevant to Project components and robust enough to support overview presentations to the Governor and members of the State Legislature.

The Phase One Project begins the development of both an implementation plan and initial implementation steps for the creation of the *Idaho Virtual University Consortium*.

◆ **Phase Two — January-March 2000**

(See fuller description at the end of this document)

Based on the results of the Phase One Project, Phase Two focuses on the further fact-finding in order to prepare for the Phase Three development of the IVU Consortium website.

A corollary priority for Phase Two activities and analyses is to set the stage for presidential decision-making related to the initial implementation planning and future investments in the IVU Consortium.

◆ **Phase Three — April-June 2000**

Based on the results of the Phase Two Projects, Phase Three focuses on the development of the initial IVU Consortium website. All of the Phase Three discussions, decision-making, and analyses create the understanding and baseline for what can be designed into the website including parameters and intelligence.

Phase Three also continues the development of “next steps” planning for continuing the development of the Consortium.

SUMMARY CONCLUSIONS AND RECOMMENDED NEXT STEPS

Introduction

With the help of staff members at each campus, we have been able to compile and analyze a significant amount of data and information. You will find that data and information in subsequent sections of the full report. [Related information: 1) Comparative Analysis Summary, 2) Full Comparative Analysis Profiles, 3) Information Technology Comparative Analysis, 4) Strategic Planning Comparative Analysis]

We are summarizing our conclusions and recommended next steps using a format we have used throughout Phase One. We appreciate the work of Massey and Curry (op. Cit.) and have used their analysis format whenever possible in the Phase One analysis and reporting.

We completed this analysis also in consideration of “Assumptions and Context for Recommendations” that the Presidents confirmed as important in their December 7, 1999, meeting. We wanted to confirm that we were on track with the approaches we were taking in designing the Project’s phasing as well as undertaking the analyses. These assumptions may change in the Phase Two Project as the conversations proceed about structuring the consortium. The following, however, are our beginning point assumptions.

- ◆ Competitive in the distance education environment
- ◆ Leverage statewide investments in the infrastructures that support education and learning
- ◆ State interests as a competitive and leveraging “edge” in distance education delivery
- ◆ Customization for Idaho current and potential student/learner groups (i.e., the student-centered user-framed value-added approach)
- ◆ Enhance learning by improving the learning experience of both traditional and off-campus students through greater use of remote, network-based, and other mediated resources to supplement traditional teaching methods and materials
- ◆ Economics of distance education where cost and value-added come together
- ◆ Shared consortia investments and/or separate campus investments

In the following sections, we present the overview analyses of all of the data and information supplied by the participating institutions.

Basic Profile

The components of the **Basic Profile** include:

- ◆ **Years in the electronically delivered business**
- ◆ **Growth over the past five years**
- ◆ **Current geographic markets**
- ◆ **Profitability**

Strengths

Foundation as a springboard

Your colleges and universities taken together have developed **a foundation that you can use as a springboard** to create the IVU Consortium. Each of the universities and colleges have engaged in some form of distance education for a number of years—some with extensive histories. In general, the programs have grown in one way or another over the past five years.

You have linked your distance education development, for the most part, with communities and individuals across Idaho. This provides you a distinct advantage as you compare yourselves to your distance education competitors. **You know your state and they do not.**

Profitability

In terms of profitability from the “strength” perspective, the emphasis is on the student/learner access to education as a “value added” by the electronically delivered courses as opposed to “profitability” as seen from the perspective of recovering costs or creating revenue in addition to costs. See below for “things to think about.”

Infrastructure Investments

Your institutions have made what looks to be significant investments in information and communications technology infrastructures. In some instances, this is true for physical plant and staffing infrastructures as well. This is part of the solid foundation you have built to support distance education and electronically delivered courses and programs. Please see below for something further to think about with regard to further possibilities to leverage these investments.

Things to think about

Geographic Market:

The current geographic market for each institution reflects formal regional responsibilities. This is practical—particularly in regard to off-campus delivery mechanisms that require a receiving site. It may be important to think about the potential afforded by the fact that all electronically delivered classes can also be sent to on-campus facilities at any institution—in light of Carol Twigg’s work exploring the potential of taking advantage of technology to redesign courses and lower unit costs. [<http://www.center.rpi.edu/PewGrant.html>]. In addition, web-based courses are geographically independent and may be more defined by the identification of niche markets.

Profitability:

In terms of profitability from the perspective of things to think about, it may be helpful at some point to consider the tradeoff between the access provided today versus the “**opportunity costs**” of other important capacities that might benefit the “electronically delivered” student/learner. Opportunity costs reflect what you are not able to do because of what you are currently doing.

In discussion with the Chief Academic Officers on January 20th, for example, they expressed concern regarding the need they have on each campus to strengthen information and communication technologies infrastructures. In addition, there is a compelling need to provide the support vital to faculty and staff members who are continuing to adopt and apply electronic technologies to course design and delivery.

The **tradeoff** to weigh relates to short-term and long-term needs, possibilities, and related investments. If the Chief Academic Officers were able, for example, to focus short-term investments toward on-campus infrastructures, it could be possible to increase the capacity to create electronically delivered courses more rapidly which would—in turn—improve access to off-campus courses and programs.

The key here is to be able to understand the cost/benefit/value-adding tradeoffs inherent in every investment decision.

Finally, profitability can be affected by the potential to **leverage infrastructure investments**. Your institutions have made what looks to be significant investments in information and communications technology infrastructures. It is not clear from the strategic plans, however, to what extent your institutions aim technology investments to serve the educational needs of students both on and off the campus—through the use of information technology as well as face-to-face interaction with faculty members and with other students/learners.

Learning Model

The components of the **Learning Model** include:

- ◆ **Accreditation**
- ◆ **Courses and programs**
- ◆ **Students**
- ◆ **Pedagogical model**

Strengths

Accreditation:

The Northwest Accreditation Association accredits each of the universities and colleges.

Web-based Course Delivery:

Your entry into Web-based course delivery is mixed in terms of years of experience and the ability to time growth. But you have the potential to offer niche market programs (like the Engineering and Health Sciences programs at UI and ISU) as you continue to bring more degree and certificate programs online.

Technology Platform and the Content of Courses or Curriculum:

The key aspects of a learning delivery model are the technology platform and the content of the courses or curriculum. It looks to us (though it would have to be confirmed or denied) that across your campuses you have some degree of convergence in terms of expanding web-based and Internet-based course development and delivery. Each institution already uses mixed models for delivery, which—in turn—have different learning modalities. So, you have content that you are already delivering, alternative delivery capabilities, and movement in the direction of expanding your web-based course activities. You are already able to leverage these investments.

Courses and Programs—Fall 1999:

With the able assistance of staff members at each campus and Blake Beck, we were able to compile a spreadsheet of the courses and programs offered in Fall 1999. While this data may not yet be totally complete, the participants are now able to sort the data in a variety of ways.

We provide in this Final Report brief examples of the types of course and program information for Fall 1999 that can be derived from the full Courses Spreadsheet.³

- ◆ Your institutions offered 489 for-credit courses
- ◆ Some of the courses have multiple sections which totaled 717
- ◆ There were 5,984 enrollees
- ◆ In terms of enrollment, the following table shows the percent of total enrollment for the number of students appearing in the left-hand column.

Courses or Sections Delivered to this Number of Students	Percent of the Total Enrollment in Courses and Sections
1 student	19%
2 students	11%
3 students	10%
4 students	10%
5 students	3%
6 students	3%
7 students	4%
8 students	5%
9 students	2%
10 students	3%
11 students	4%
12 students	3%
13 students	2%
14 students	2%
15 students	2%
16 students	2%
17 students	1%

³ This data may not be entirely accurate and would be confirmed in Phase Two. The tables are to indicate the kinds of analyses possible.

Courses or Sections Delivered to this Number of Students	Percent of the Total Enrollment in Courses and Sections
18 students	2%
19 students	1%
20-29 students	6%
30-39 students	3%
40-49 students	2%
50-59 students	.5%
64 students	.1%
75 students	.1%
82 students	.1%
99 students	.1%
102 students	.1%

- ♦ In terms of courses and sections by university or college, we see the following pattern:

Institution	Percentage of the Total Courses and Sections Offered
BSU	18%
CSI	9%
EITC	.1%
ISU	22%
NIC	6%
UI	33%

- ♦ In terms of transmission method, we see the following pattern

Transmission Mechanism	Percent
Compressed Video	35%
Computer Mediated	1%
Internet	20%
Internet/MultiMedia	1%
Internet/Modem	3%
IPTV	.1%
IPTV/Campus	1%
Microwave	8%
Radio	.1%
Video Tape	22%

- ◆ Per the Comparative Analysis (in a following section), participants have indicated that they offer 12 degree or certificate programs through their distance education delivery:

College or University	Degree/Certificate Programs
BSU	Masters in Instructional and Performance Technology
	Educational Technology in Education, which is currently a certificate program, but will grow into a Master's degree
CSI	Associate degree delivered to many campus sites
ISU	The College of Pharmacy offers a non-traditional PharmD program that is delivered using videotaped classes and minimal contact time
LCSC	B.S. in Business Administration (available in Coeur d'Alene)
	B.S.N. in Nursing (available in Coeur d'Alene)
	B.A./B.S. in Communicative Arts
	B.S.W. in Social Sciences
	B.A./B.S. in Justice Studies
	B.S. in Interdisciplinary Studies with an emphasis in Business and Communication (Web-based) Interdisciplinary Studies
	Minor in Chemical Dependency Counseling
UI	Engineering Outreach providing complete off-campus, distance-delivered graduate degree programs in twelve disciplines

Pedagogical Models:

These models appear to differ depending on discipline, department, level, and technology as appropriate. There are mixed models including limited class size, interaction, collaboration. Courses offered via compressed video tend to employ traditional pedagogical models of lecture/discussion. Online courses can be built on a more student-centered model. Web-based courses can involve both synchronous and asynchronous features. Some courses are self-paced and some are not. For the web-based courses, students can participate in online discussions, chats, listservs, and some face-to-face instructor/student interaction. Some courses require labs and on-site assessments.

Things to think about

Courses:

It appears that many (if not most) of your electronically delivered course and program offerings have developed incrementally in response to perceived needs and opportunities. There is some identification of niche markets. In some instances, on-campus students are also taking electronically delivered courses that are part of distance education program. It could be helpful to the future development of the Consortium to begin to gather more specific demographic and evaluative data.

Students:

In general, it appears that there is little data regarding student demographics. Some of the institutions offer students the opportunity to evaluate their distance education experience.

Pedagogical Models:

There is variety among the colleges and universities' pedagogical models. This includes a range spanning traditional, didactic student models to more student-centered web-based designs.

Business Model

The components of the **Business Model** include:

- ◆ Course production
- ◆ Course delivery
- ◆ Faculty
- ◆ Learner Support
- ◆ Marketing
- ◆ Expansion Strategy

Strengths

Access Model:

The primary business model is one of providing “access” rather than recovering costs or creating profitability. In terms of a **Profitability Model** (which may be an appropriate fit if the Colleges and Universities want to compete with outside distance education programs such as Phoenix Online), it will be important to test the costing models recommended below. In addition, “profitability” includes the ability to compare “costs” with “revenue.” At this time, course by course revenue data would have to be estimated (per Chief Academic Officers at the January 20th meeting). Very few, if any, college and university accounting and/or financial management systems support the ability to produce course-by-course revenue.

Course Production:

In general, course development is decentralized. In some instances, the approaches are focused on a cost-effective delivery system. The development of electronically delivered courses generally rests with individual faculty members or faculty teams with the assistance of support staff. Compressed video delivery may be delivered with only minor adaptations to the methods of the traditional classroom. FrontPage, WebCT, and RealAudio tools are sometimes used.

Course Delivery:

Participants use different delivery mechanism and support approaches. Remote sites can allow for 2-way audio/video communication. There may be a faculty stipend for the development of electronically delivered courses. Release time may also be available. The delivery of video-based courses can require the assistance of a variety of people trained in distance delivery.

Faculty:

Faculty are generally regular department approved and assigned faculty. Again, there may be faculty stipends and/or incentive pay. In some instances there is a growing cadre of faculty expressing interest in the development and delivery of on-line courses. In recent years, some faculty and other staff members have been attending regional and national conferences on technology as well as on-campus training. There is some use of faculty team approaches. Available support may vary from college to college.

Learner Support:

There are a variety of approaches to providing student/learner support including library, bookstore, and administrative services, though this also varies among the campuses. It is generally the goal to offer the same level of service to students at distant sites as to students on campus, though there may be some modifications. In some instances, online registration and fee payment is not available. In other instances toll-free numbers are provided and/or campus staff members may be available at remote sites on specified days. Email can also be available.

Things to Think About

Marketing and Expansion Strategy:

As stated above, you have definite advantages in the distance learning marketplace, but you are also at a distinct disadvantage in that your institutions generally do not have a competitive dynamic and higher education does not normally work with a “bottom line” business culture. In addition, there are few if any educational accounting or financial management systems designed to report revenue on a course by course bases. As the Chief Academic Officers have indicated, course revenue would have to be estimated. Since marketing can include an estimate of revenues possible by market segment, it may be useful to test possible revenue and costing models or approaches in Phase Two.

In their write-ups, participants generally do not discuss the identification of market opportunities the institutions have pursued in the past. At the same time, Lewis-Clark State Colleges states that they have developed a marketing plan. Boise State University and the University of Idaho have the development of marketing studies in their strategic plans.

The ability to derive revenues and consider unit costs and/or across-campus infrastructure investments is essential to being able to understand today’s educational delivery tradeoffs. This ability needs to be developed at many of your institutions.

Equally important to evaluating delivery tradeoffs is the ability to assess the “opportunity” costs of doing what you are doing now—to help you understand the cost/benefit/value-adding tradeoffs inherent in every investment decision. Opportunity cost reflects what you are not able to do because of what you are currently doing.

The write-ups tended to demonstrate that there is no pervasive sense of the very competitive threats that face all institutions of higher education as they compete for future education dollars.

From Individual Institution to Consortium

Giving thought to the “things to think about” is important for any single institution. It is especially important for universities and colleges coming together in consortium.

In today’s competitive education environment, it is essential to think strategically when making the operational decisions that are part of a start-up. As you create this consortium, you are not substituting one thing for another. Rather, you are creating and sustaining a transition path. The pace of today’s transitions is faster than higher education has been comfortable with in the past. It is critical to address the right strategic issues at the right time, in small enough chunks that you make decisions and progress at every step. This is what we are suggesting in the Phasing approach.

If you are going to be active and competitive outside Idaho in a way that would at least recover your costs, you will also need to address this in your start-up considerations and consortium structuring.

Wherever variety exists among participating institutions in regard to the Basic Profile, Learning Model, and Business Model, it may be strength since it supports flexibility, as well as the culture of each campus. In terms of the initial implementation of the Consortium, the Chief Academic Officers will want to consider where and how to balance variety and consistency in terms of structuring the consortium and the face it presents to the public.

As we have developed and considered this overview of the present state of distance education and electronically delivered programs and services, we have tracked the instances where Phase Two further thinking and discussion will be important. As a result, we have developed the Recommended Next Steps for Phase Two.

Recommended Phase Two Next Steps

- ◆ **Complete course definitions and compilations relative to distance education and/or electronically delivered education** to know what the initial content of the initial Consortium website will be. In Phase One, participants provided information for courses and sections offered through the formal distance delivery program. Many participants noted that there were additional electronically delivered courses available from other campus sources. Acquiring that information would require further coordination and detailing of the definitions of the courses to be included. These issues were discussed in detail during the Phase One project, so we know the scope, challenge, and importance of completing this task.
- ◆ **Develop alternative definitions and structuring of the consortia for discussion and decision-making** to reach agreement in this matter since defining the consortium is vital to being able to create the components essential to the consortium's business model.
- ◆ **Prepare an up-to-date overview of the operational and strategic technology (information and communications)** to determine what "public face" the consortium can present today and over the next year. This step is vital to the design and implementation of the initial consortium website, as well as to the subsequent development of a website with ever more "intelligence" designed into it.
- ◆ **Lay the foundation for developing cost/benefit/value modeling in Phase Three.** An introduction to the tools will be in the *Final Report: Phase 1 Project*. To be able to afford to be competitive, you must be cost effective. It is also essential to be able to model alternative educational delivery approaches like the high school dual enrollment initiative. Workable counting and accounting systems are requisite in today's environment. Laying the groundwork in Phase Two results in the ability to model different strategic and marketing directions in subsequent phases.

- ◆ **Begin the Student-Centered user-framed, value-adding interview discussions** to explore initial student-centered approaches that will add the greatest value to the consortium’s learning model. This is different from and yet complements marketing considerations. The “Competitiveness” report noted that a consistent failing among the 11 institutions reviewed was understanding and creating student-centered content development and delivery—and an efficient and effective learner model for the consortium. An important by-product of the interview discussions is the way in which they strengthen understanding and other relationship building with individual, organizational, and business constituents across Idaho. The intention would be to complete interview discussions at each campus and with individuals and organizations (e.g., related to economic development and/or potential student/learners) complemented by a brief survey of other institutional approaches.

Phase 2 Outcomes

Defining and committing to these Phase 2 activities begins to define for the Governor and other interested parties how you are developing the consortium conceptually and practically. This will support the subsequent development of the vision and mission statements. You will be able to talk now about funding and its availability. Other outcomes include:

- ◆ **Course and Program Report:** You will decide on which courses and programs will be part of the initial IVU Consortium roll-out — and how to stage subsequent additions.
- ◆ **Consortium Alternative Organization Structure Report:** You will decide on the **initial** structure of the IVU Consortium in order to develop the business, strategic, and marketing plans.
- ◆ **Technology Infrastructure Capability and Compatibility Report:** You will make decisions to leverage your current technology investments; guide the design of your initial working consortium website; and facilitate the development of the IVU Consortium's business, strategic, and marketing plans.
- ◆ **Cost/Benefit/Value Modeling Steps Report and Plan:** You will be able to decide whether or not to use either of the two available cost modeling approaches, use another approach, model at all, and/or when to begin.
- ◆ **Initial Student-Centered Design Considerations document:** You will decide whether this is a viable and productive tool that can support the design of your initial IVU Consortium website; and facilitate the development of the IVU Consortium's business, strategic, and marketing plans.
- ◆ **Status Report and Subsequent Phases and Implementation Steps Recommendations:** To help you in your thinking about what to do next.

Phase 2 Analyses Tools

Following are the tools we are suggesting as possibilities to support some of the Phase Two work.

- ◆ **User-Framed Value-Added Model:** Provides a methodology for surveying the information-seeking and problem-solving behaviors from the clients' perspective. The survey takes the form of interview discussions guided by a set of simple questions. We analyze the results of the interview discussion looking for patterns that then guide the development of commensurate decisions on how to add value to the user of your educational system. These interviews and accompanying analyses are vitally important. You will learn things about every aspect of your University — from the perspective of your clients or potential clients. There are six categories where value-adding processes can result in utility as perceived by users: 1) Ease of Use, 2) Relevance, 3) Quality, 4) Adaptability, 5) Time Savings, and 6) Cost Savings.

- ◆ **Infrastructure-Based Cost Modeling:** Cost modeling is done via a series of interconnected spreadsheets. The spreadsheets provide a real dollar picture of how current programs and services employ sustaining infrastructures and how proposed new services would impact existing infrastructures, the degree to which infrastructures can be leveraged, and the real cost of instituting new models of service. The cost model provides a wealth of information for strategic decision-making about services, content, personnel, resources, etc. It also enables faculty and staff to test alternative educational models.

- ◆ **Instructional Task Analyses and Financial Planning:** Carol A. Twigg at the Rensselaer Polytechnic Institute has developed this approach. Its primary focus is redesigning large-enrollment courses in order to reduce costs and devise instructional models that can be developed depending upon institutional circumstances. The activity-based costing involves the following:
 - Step 1: Identify the tasks associated with preparing and offering the course in a traditional format and the categories of personnel involved.
 - Step 2: Determine all personnel costs expressed as an hourly rate.
 - Step 3: Determine how much time each person involved in preparing and offering the course in a traditional format spends on each of the tasks.
 - Step 4: Repeat steps 1 through 3 for the redesigned course format.
 - Step 5: Compare the two costs and calculate the savings.

*Distance Education at Postsecondary Education Institutions: 1997-98*⁴: Analysis framework for defining, organizing, and presenting relevant statistics. Our ability to draw conclusions and make recommendations is made easier as a result of other reports in which authors profile different aspects of distance education. This report is not only useful for the overview and context it provides, but also because its authors have created and applied definitions for the categories into which the statistics can be organized. This structure and approaches for gathering and analyzing relevant statistics will be very useful to the IVUC members as you consider how to organize and present individual institutions as a “consortium”. The report chapters include:

- ◆ Institutions and enrollments
- ◆ Course offerings and enrollments
- ◆ Degree and certificate programs
- ◆ Distance education technologies
- ◆ Tuition and fees
- ◆ Changes in Distance Education since 1994-95
- ◆ Survey questionnaire

We have prepared preliminary descriptive materials related to these tools and the five Phase Two projects. They were distributed and discussed briefly at the Chief Academic Officers meeting on January 20th 2000. We summarize them in the subsequent section.

⁴ National Center for Education Statistics, Statistical Analysis Report, U.S. Department of Education, Office of Educational Research and Improvement. Prepared by Laurie Lewis, Kyle Snow, Elizabeth Farris, Douglas Levin, and Bernie Greene. December 1999. <http://nces.ed.gov/pubsearch/pubsinfo.asp?2000013>

PROJECT COMPONENTS

The *Final Report: Phase 1 Project* includes multiple components. The components work together and speak to different aspects of the project. We completed the following analyses for *Final Report: Phase 1 Project* and its recommendations.

- ◆ **Comparative Analysis Framework:** Provides a checklist of descriptive elements related to:
 - ◆ A basic profile of the online program,
 - ◆ The program’s learning model, and,
 - ◆ The program’s business model.

We looked at components of the Consortium’s distance education programs in order to compare Consortium’s programs to others in terms of competitive potential.

- ◆ **Technology Infrastructure Analysis Framework:** Provides a checklist of descriptive elements related to the technology infrastructure that supports the distance education program. We looked at each institution’s technology components that are particularly relevant to distance education. This enables us to begin to understand the challenges of presenting information from separate institutions where the institutions are forming a consortium.
- ◆ **Strategic Planning Analysis:** Mirrors the Competitive Analysis Framework to categorize strategic planning documents — and relating the plans to external factors. We reviewed each institution’s available strategic planning documents to understand how individual campus planning may fit together to facilitate and sustain a consortia approach.
- ◆ **Current Courses Analysis:** Provides an overview of programs, courses, enrollment, delivery mechanisms, etc. for fall 1999. We began the analysis of courses, programs, and enrollment from fall 1999 for each institution and for the institutions as a whole. This enables us to understand and map patterns among current courses, degree programs, certificate programs, enrollments, delivery mechanisms, etc.
- ◆ **IVUC Website Scenario:** A “staged” website, designed to suggest some important consideration points — and to suggest how a Web-based front-end for a series of sophisticated databases might present itself to learners and potential learners. We completed the design of the website scenario and designed it to illustrate key design issues.

- ◆ **User-Framed, Value-Added Analysis.** K. Gapen and N. Szofran completed two User-Framed telephone discussion interviews to illustrate the importance and usefulness of the user/client/student.). [see the Appendices for the initial transcript]

- ◆ **Distance Learning and Universities:** NLI provided a research report on distance learning and universities by interviewing experts and by searching the World Wide Web. We created an executive summary of issues, competitors, and examples that impact distance learning opportunities for higher education. We also provided in the appendices the summary statement from the National Center for Education Statistics Report *Distance Education at Postsecondary Education Institutions: 1997-98*. [see later citation]